



PREMIER MINISTRE



A maritime ambition for France

Report from the POSÉIDON Group

STRATEGIC SUMMARY

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Working Group “French maritime policy” (POSÉIDON)

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Warning: This strategic summary summarises the main guidelines and recommendations resulting from the "Poséidon" working group. The main report, for its part, provides the information on which the group's considerations were based, following the approach of challenges/strengths/weaknesses for France.

1. Why does France need a maritime policy?

1.1. Significant historical assets, an uneven present

Even if it is not always aware of it, France is a maritime nation. This has been the case throughout its history. Maritime life has profoundly marked the country's culture and heritage; its civil and military impact has been deep and lasting.

It has not however always been a **maritime power**. It has never spontaneously been so (just compare the Dutch and British colonial companies to ours), and only had a maritime ambition to the extent that its kings had one; unlike the Spanish monarchies, French monarchs were inconsistent in this field, or did not create useful and **lasting** links. France has often turned its back on the sea, and royal infrastructure investments were almost always unsuccessful: the success of Le Havre barely compensates for the failures of Rochefort and, long ago, Aigues-Mortes.

For all that, the French have a connection with the sea: coastal tourism, resorts, pleasure craft, great sailing competitions and gatherings of period ships arouse keen interest, yet this is not enough to create an in-depth interest in the economic challenges of the sea and the fragility of the natural heritage. Emotion during crises (accidents at sea, marine pollution disasters, clandestine immigration and so forth) is short lived.

► *France has indisputable maritime credentials and assets*

Thanks to its overseas territories, with an eleven million square metre Exclusive Economic Zone (EEZ), France has the second largest maritime area in the world, after the United States. In the strategic area of the Indian Ocean alone, areas under French jurisdiction cover a surface eight times greater than that of mainland France.

This vast maritime space, spread over the world's oceans, also provides France with rich marine biodiversity, which is both an asset and a responsibility.

An added value of almost 19 billion euros, a workforce of around 500,000 employees working full time (of which 320,000 direct jobs) show the weight of the French maritime economy in 2003:

- *French maritime financial services* (insurance and banking) *and business services* (provision of petroleum and gas equipment in the areas of exploration-production, the offshore sector, the laying of pipelines etc.) have a significant presence in international markets: numerous French companies using cutting edge technology have posted remarkable results, with the French parapetroleum sector being the second exporter in the world after the American sector. By way of example, the Compagnie générale de géophysique, with the recent acquisition of VERITAS, will have the world's largest seismic fleet. High productivity means that while offshore parapetroleum contributes only 5% of maritime jobs, it contributes 9.5% of maritime added value.
- *The French merchant shipping sector*, despite fluctuating demand for sea transport, currently on the up, has posted regularly positive results and is a global leader (the CMA CGM group has been the third container transport group in the world since 2005). The workforce for French sea transport, currently experiencing sustained growth, is the second largest sector for maritime employment, with around 13.5% of the total.
- *The pleasure craft industry* has been in rude health, tripling exports in eight years to over 60%, mainly within Europe (with a global leader, the Bénéteau group).
- *Naval construction*, which is also a world leader, has had great (if of course cyclical) success in the key market of cruise liners, which are complex and difficult to build.
- *The French naval military sector* is the leader in Europe; DCN in particular is the main integrator of naval systems on a European level.
- *Coastal tourism* represents almost half of the maritime economy (47%), both in production (almost 9 billion euros of added value) and jobs (around 237,000).

- *French research* has strong positions in certain scientific specialities, in particular some areas of marine research and operational oceanographic matters. Strongly diversified, research is carried out by several bodies with very different and globally recognised specialities, which regularly contribute to Europe-wide and even global programs (IFREMER, CNRS/universités, SHOM, IRD, Institut Paul-Emile-Victor).
- Finally *The French Navy*, which provides most of the workforce in the public maritime sector (around 12% of French maritime jobs) occupies a visible and highly respected place in oceans around the world.

► *The French maritime position does, however, have several weak points*

The development of the global context, the pressure of competition and growing limitations on resource management, have rendered several weak points increasingly evident:

- *The commercial fleet sailing under a French flag* is only 27th in the world in terms of capacity: although it has grown slightly since 2003-2004, it only comprises some 210 vessels over 100 tonnes gross capacity, compared with almost 800 in 1962 and 515 in 1975 – mainly oil tankers, ferries, cargo ships and ROROs. One of the causes of this situation is the difficulty experienced by France in developing a comprehensive policy supporting the competitiveness of the national flag: the new French International Register (RIF), replaced in May 2005 the old 'registre des Terres australes et antarctiques françaises (TAAF)', (French Southern and Antarctic Territories Register), and has created more favourable conditions for the registration of long distance and international coastal navigation commercial vessels; however, this new system will only be attractive for companies as a result of more beneficial social and fiscal measures enabling the merchant shipping sector to invest in the national flag under competitive conditions which are comparable with their European and international competitors. In particular, the French flag is at risk if, in the very short term, the RIF is not accompanied by a fiscal measure supporting appropriate and long lasting investment (fiscal EIG or equivalent measure).
- *Merchant shipping has seen a collapse in French jobs*. While it is true that falling employment in this sector is an international phenomenon, the workforce of French sailors has nevertheless fallen from 43,000 at the beginning of the 1960s to less than 10,000 today, with passenger transport and port activities dominating.
- Despite a dynamic global market, the market share of *French shipyards* in the construction of standard vessels (containers, bulk carriers, oil tankers, methane transport) is currently weak. The methane sector, in which French shipyards were pioneers, boasting renowned know-how, is representative of this situation. The conditions of competition, modified by different national support measures, here play a crucial role.
- *Fishing* needs to make a choice; the development of jobs in the French fishing sector is tightly linked to reductions in the catch capacity (- 37 % in vessels between 1990 and 2004) and production. A significant number of fish stocks have reached reasonable biological limits, and the common fishing policy (CFP) is struggling to integrate all economic, social and environmental dimensions. The prospects for developing marine aquaculture, crucial to partially making up for shortfalls, are challenged by a difficult regulatory and political environment.
- *The coast*, in high demand, is reaching saturation point. It has become vital to think of any development (residential and hotel construction, capacity for berthing of pleasure craft etc.) within a context of integrated management. For example, poor availability of berths in pleasure harbours along the French coast and the difficulty of reconciling different uses limit the possibilities for expansion of pleasure craft construction, which is cutting edge and fortunately highly exportable. The rapid change in social, ecological and cultural balance threatens tourist services.

Finally, the relentless increase in **energy** costs over the long term creates uncertainty and thus concern.

Professionals in the maritime sector are fully aware of these weaknesses. They know that no benefits are acquired definitively and that they need to be constantly improving their competitiveness, in particular through innovation.

This is the main condition for France to maintain its standing as a maritime nation.

1.2. A renewed dimension

It is undoubtedly the time to take another look at the challenges and promises of the sea at the beginning of the 21st century.

France's maritime assets, long hidden by pleasant nostalgia and a reassuring continental tropism, are again in the spotlight, alongside the main developments of these last two decades: **globalisation of the economy** and the "explosion" in commercial exchanges; increasing awareness of the sensitivity and vulnerability of **a human heritage** bearing great riches, economic hopes and the question of ecological balance; the spreading of electronic technologies and the dominant place assumed by the **information society**; the impressive emergence of **new economic players** (Asia); the growing inter-connection of **geopolitical contexts**; the appearance of real risks in relation to **terrorism** and **piracy**; and, more recently, the acceptance of the need for **sustainable development**, inspired in particular by the scarcity of certain natural resources and the need to adapt to a changing climate (greenhouse effect).

In this last area, the controversy over the regulating effect of the oceans, debates over current inversion, the prospect of rising sea levels, increases in coastal erosion, increases in the strength and frequency of extreme weather events and the development of biodiversity, all represent major long-term challenges.

Lastly, the prospects for establishing a **political Europe**, going beyond the ambitions of a purely economic community and steering a path between deepening ties and expansion, add an original element, with an undoubted impact on France's view of today's maritime challenges.

All these elements give the **ocean a new dimension** and give rise to a true change in scale. In some respect the sea is, for better or for worse, still a **large area of economic and legal freedom** despite the fact that our knowledge of it is still only partial ("the sea, the great unknown"). While the oceans cover 71% of the surface of the planet and contain, according to some, 80% of its biodiversity, we know space better than the water which surrounds us and the life it sustains.

Awareness needs to be raised so that this space of economic freedom, but also struggle, can be better controlled and exploited, to become a source of **unexpected opportunities**. The profound and shared conviction of the working group which has met since October 2005 within the framework of the "POSÉIDON" is that now is the time to reflect on the conditions to be met for creating these opportunities, making the most of the conflux of a range of new circumstances (globalisation, Europe, energy, sustainable development), and proposing to the government **the elements of a true maritime policy**. "The sea, the future of the earth" and "the sea, source of a new modernity" might be the mottos of a new political ambition at this, the dawn of the 21st century, comparable to the ambitions which accompanied the post-war reconstruction of France, the nuclear power programme and space exploration.

1.3. Why do we need an integrated maritime policy?

Governments have of course always tried to deal with maritime problems using adapted public policy, especially during the second half of the XX century. However, the extent of the challenge in such a vast, often mythicized (round the world races and great sporting exploits), heterogenous, diverse (the ocean surface, the seabed, coast) and complex area (political, scientific, economic, industrial, social, military, diplomatic etc.) has favoured "**sectoral**" policies which do not take into account the need for **integrated** measures and sufficient **coordination** of public actions. The **separation** of ministerial and territorial interventions has, in the absence of an overarching view, certainly weakened the overall effectiveness of the joint action of state and local groups.

The lack of visibility of certain policies, certain inconsistencies affecting public actions and the multiplication of conflicts of interest and use, in particular along the coast, are regularly highlighted, most recently by the French ports audit office.

The above argues strongly for an initiative aimed at reviewing public policy in the area: the very nature of the challenges involved in sustainable development of the maritime economy requires that **the better part of current and future support for the sea must be sought, through greater synergies, in the economy and domestic growth.**

All players and partners in the maritime sector must accept and support (for example through a cluster) this requirement if they want the proposals presented in this report to be credible and of interest to political decision-makers. This effort to bring perspective to an **integrated maritime policy** for France fully responds to the call made by the Prime Minister in October 2005.

2. A national ambition to prepare for the future

2.1. A vision of the future

The working group soon came to an agreement as to the importance and necessity of sketching, albeit in broad strokes, **a future vision for the sea expressing a national ambition.**

This vision is described on the basis of four key elements identified during the group's work:

- Boosting of **safety** and **security** in maritime activities,
- Improving **knowledge** of the marine world,
- The contribution of the maritime sector to the **economy, growth and employment**, in particular through innovation and competitiveness,
- The **protection and exploitation of France's natural marine heritage.**

The first two elements respond to the observation that any effort or development is doomed to failure if the sea is neither *safe nor secure* as well as to the need for exploring this unknown world, full of riches and major challenges for the future.

The two latter elements directly link the endorsement and implementation of a credible and lasting maritime ambition to the concept of *sustainable development*, particularly important in an area which suffers from great inertia and retains the memory of the violence to which it has been subjected (over-exploitation, marine and land pollution etc.).

The proposed maritime vision expresses the following twin desires:

To make a commitment to the maritime sector is to express the wish that France takes an active role in the positive development of the marine world, which is by its very nature global. It also involves showing a desire to defend its interests –even to conquer a place for them if necessary – while participating in one of humanity's greatest assets.

This desire can be expressed by the choice of carefully identified economic opportunities and by encouraging Europe to give greater attention to the sea.

2.2. What specific measures will make this maritime ambition a reality?

The working group has formulated the following recommendations:

- **Systematically taking into account the maritime dimension of public policies** and parliamentary and governmental decision-making processes. Taking this dimension into account may draw upon the *generalisation of preliminary impact studies* for legislative and regulatory projects, a measure with which the government has already experimented and which could be usefully extended to evaluating the impact of proposed actions on economic, social and environmental aspects of maritime life.
- **The quest for complementary maritime and land policies:** This is an important condition for success to the extent that the need for integration relates as much to “vertical” integration (synergy between players at different levels) as it does to “horizontal” integration (in which sectoral or territorial policies of all types complement each other). It is necessary to “talk about the ocean” to everyone and try to bring about “positive externalities” in numerous public policies, even when they do not have an apparent direct link with the sea. To achieve this goal, the establishment of an area of expertise, reflection and proposals is recommended to monitor, without directly interfering with normal decision making centres, the expression of this complementarity and to bring an integrated vision to bear upon all challenges facing coastal and maritime life.
- **Enlightened mobilisation of all actors: These include** the state (in conjunction with and across Europe), regions, economic players, civil society – in a word, the entire nation – as well as supranational elements (international courts) and spontaneous “coordination” (Conférence des régions périphériques maritimes, etc.). What’s more, these actors must be aware of the prospect that their roles will be upset in a context radically different from that seen just a few years ago, one characterised by the domination of competition on a global level (naval construction, merchant shipping, tourism etc.), the generalisation of new operating methods, public-private partnerships and the political consolidation of regional factors. This is particularly the case for the state, long habituated to sovereign action.
- **Strengthening local cooperation and responsibility:** Starting from the observation that there is a growing difficulty with reconciling the numerous different uses to which marine areas are put as well as the often divergent interests of those who live there, ensuring the participation of a majority of actors and citizens will inevitably involve a new *decentralisation* of certain decisions which are recognised as being of local or regional scope via the development of painstaking *public surveys* and the possible establishment of *new methods for local consultation*.
- **Taking into account the European factor:** It has been observed that the problems of the sea are often, by their nature, European issues and should be treated as such. *France’s involvement in the EU’s process of appropriating maritime matters must therefore be clear*, even if it must be carried out with discretion, respecting France’s sovereign independence and the principles of subsidiarity.
 - Europe is an important actor in maritime policy; this is a fact (fishing, environment, maritime safety and security etc.). It is likely to keep, and indeed extend, its area of competence.
 - The question arises as to whether Europe is effectively looking after the sea. The adoption and publication on 7 June 2006 by the European Union of its Green Book on EU maritime policy, which has been subject to consultation among member states for one year now, is particularly well suited to understanding this question. This Green Book highlights clear successes (environmental protection), sketches out those areas on the right track (security, maritime transport etc.) and points out gaps and possibilities for making progress (knowledge of the sector, research, security etc).
 - New areas for intervention are therefore opening for Europe. Greater take up seems evident in relation to information exchange (oceanography etc.), habitat research (biology etc.), safety and security and of course environmental protection. Other viewpoints may be put on the table as long as they respect the principles of subsidiarity: measures against illegal immigration, the use of non-living resources, dismantling of vessels etc.

It is entirely legitimate to deal with maritime matters on a European level: The EU supplements and takes up French action, which can only be effective on all fronts. The proposed national ambition can only be fully implemented **within the European Union**, where France seeks, together with its partners, to become an effective participant in turning Europe toward the sea.

France must therefore continue, with discernment and respect for its sovereign independence, to provide constructive proposals with a view to the eventual adoption of a community-wide action plan in 2008, extending the June 2006 Green Book in a way compatible with the principle of subsidiarity.

Such an action would undoubtedly provide an example of a *Europe of projects* (see the proposal for the European collaborative program below), constituting a political dynamic in an area which seems capable of generating maximum participation.

2.3. The fundamentals

The credibility of the recommendations proposed by the working group require that three fundamental conditions be met.

► *A stable playing field*

An effective maritime policy requires stable guidelines and a sustained effort. This requirement is even more important given that any recommendations accepted will only begin to have effect in the medium and long term. Implementing a national maritime policy involves a timeframe defined in decades. It is therefore not solely a question of proposing a maritime policy for the here and now, but also to recommend for the **State** a stance to take for the duration, despite the fact that it may not be presented or accepted as a **true national challenge**.

Put another way, it involves creating a collective desire based on long term guidelines, placing proposals for a national maritime policy on equal footing with energy policy (nuclear power stations, oil and gas exploration), the space program or aeronautic policies.

► *Budgetary realism*

In a context of difficult public finances and severe debt, this represents a significant constraint. The group is aware of the fact that a policy is not developed solely through the distribution of additional resources, but requires the redefinition of priorities for public action; it is a problem of high level **arbitration**, which is the jurisdiction of the political sphere. In this respect, the report only seeks to present and promote a convincing argument. Except for a very limited number of proposals, the group has favoured existing institutions and tools for the implementation of recommendations, subject of course to a few adaptations or developments.

There remains the fact that we have limited knowledge of current national efforts in maritime matters. This knowledge is a vital prerequisite to a serious assessment of future maritime policies. Recommendations in this respect are made below.

► *Integration*

Beyond the mere compilation of sectoral measures taken into account or likely to be taken into account in initiatives from ministries responsible for the various affected areas, the report's recommendations focus on long-term, sufficiently original collaborative proposals.

3. The main public policy recommendations

As has already been indicated, this document only summarises the main public policy recommendations: they focus on a limited number of fields of action and framework proposals: two preliminary fields, three areas for public integration and a minimum program of support measures.

3.1. Two preliminary fields of action to be strengthened

► *Maritime safety and security*

Safety concerns the **prevention of accidents at sea** and dealing with the consequences of these accidents (in particular safeguarding human life, avoiding marine pollution by oil or chemical products). **Security** refers generally to **measures combating illicit trafficking and actions** (contraband, drug trafficking, illegal immigration, terrorism, piracy etc.).

Safety and security at sea are prerequisites for the creation of wealth both on sea and land, in mainland France as well as overseas territories.

Safety and security correspond in fact to legitimate public aspirations but are also necessary conditions for economic development and improving the attractiveness of maritime areas. They also represent a real challenge to French supply routes, particular that of energy. In a globalised economy, France, both nationally and in cooperation, must affirm this **sovereign task** at all times, in all marine areas and spaces and develop appropriate tools to do so. The French concept of **maritime safety** must be promoted among other member states and benefit from the support of all ministries concerned by these issues.

Certain areas, among others, seem to require revisiting or a more in depth look:

- Maritime security

Since the 1999 Erika disaster, negotiations have been underway at a European level with a view to adopting a range of measures aimed at strengthening security by means of the third "legislative package". This "**Erika III package**" groups together the review of three existing texts and four new initiatives (state control of ports, monitoring of traffic, identification of vessels, state control of the flag, civil liability and compensation, post accident inquests etc.). France needs to durably support this action.

On a national level, **strengthening current resources and organisation** is desirable over time. The budgetary impact is clear, but should be put into context when compared with the direct economic benefits deriving from it (development) and the social and economic cost of the consequences of accidents (loss of human life, loss of economic value, pollution, loss of confidence – including among public representatives). This may be mitigated by infra-

national partnerships (public-private partnerships, sharing intervention time on some heavy equipment between authorities etc.), by cooperation between states (joint task forces) or by sharing on a community level of heavy equipment for towing and high sea anti-pollution measures, for example (European Marine Safety Agency - EMSA).

One might cite by way of example, the strengthening or just the renewal of naval or air resources for the maritime Atlantique prefecture (Brest), for areas in the Indian ocean (La Réunion), Polynesia and New Caledonia; the creation, for these last two zones, of two fully functioning RCC (Rescue Coordination centres); pursuit of RCC modernisation.

The implementation of these operations, potentially very costly in terms of investment and operation (several dozen million dollars a year), implies a significant budgetary impact over several years, and is only acceptable if accompanied by original solutions: the involvement of local groupings, the generalisation of private freight systems which perform better than state acquisition system, the sharing of government heavy equipment (shared leasing on the part of some vessels, or air resources belong to different administrations) etc.

- Maritime security

The Mediterranean and Atlantic, as well as the specific case of overseas territories, require a constant effort supported by the introduction of satellite surveillance: illegal immigration (Mayotte), drug and arms trafficking, terrorism and piracy (especially in the Indian ocean) etc.

These actions must be carried out within a framework of suitable cooperation: the creation of a lasting French-Italian-Spanish task force in the Mediterranean.

In mainland France, the improvement of port security has become a priority, based on the model of Le Havre and soon Calais.

This is a difficult and very complex operation relating at once to security measures for approaches to vessels, surveillance of stretches of water, the protection of the port perimeter, surveillance by specialist teams of fixed facilities and berthed vessels, the marking and tracking of containers, the surveillance of passenger flow, etc. The financing of such an operation (several dozen million euros of investment; several million euros a year for operation) must be shared between the responsible public authority, the operator of port facilities (adaptation of infrastructures, tracking of goods and passengers) and the state (police).

► *Knowledge of habitat*

- Scientific knowledge and information

Knowledge of the seas and oceans contributes to mastery of economic challenges. It permits evaluation of the potential for – but also the limits to – ecosystem exploitation. When made available to the main actors, this knowledge guides decision-making and action, and provides the capacity for innovation.

The nature of the challenges requires taking two major developments into account:

- *The emergence of new fields for investigation or greater exploration for research: integrated management of coastal areas, climate change etc.*

The first area calls upon the evidence supplied by new scientific developments (mapping, seismic imaging, IT, modelling etc.) but especially the collection of data in order to contribute to an **integrated geographical information system (GIS)**, both maritime and coastal.

Special mention should be made in regards to the second subject: **the greenhouse effect** and its recognised consequences – the risk of disruption to the climate, health and food supplies – appears to be the greatest challenge facing humanity in the coming decades. However, the oceans, with their enormous water masses, thermal exchanges and vast

currents, play an important role in weather regulation. A vast field of multi-disciplinary research is therefore open to scientists with a view to explaining the phenomena and anticipating adaptation to climate change.

- *The creation of a European research area*

The European Green Book lists a certain number of research priorities to promote. France will benefit from taking a position in areas where it can make the most of its experience and excellence. Through the national research area it should develop to take a position which is not only visible but also makes a contribution on a European level.

This is already what French professionals are doing within the framework of the WATERBORNE technological platform, which has produced a strategic agenda for research pertaining to the maritime industry.

To do this, France must rethink its scientific supply in order to favour the rapprochement and perhaps even the merger of the best performing organisations. In doing so, it should seek to facilitate inter-disciplinary synergies and share budgets in order to come to terms with the constantly rising expenses of access to important scientific research resources (IFREMER, civil components of research by the SHOM, laboratories, universities and teams of the CNRS, specialist engineering schools, etc.).

• Public and private research

Knowledge creation is one of the motors of wealth creation. The sea's potential appears inexhaustible in this respect. **Direct and strengthened public support for maritime research and innovation** is necessary. It is key that the state, at the cost of a shared evaluation measure, financially supports private maritime research activities, which are particularly weak, for doing so will have two results:

- On the one hand, it will speed up research in crucial sectors, which private research alone can not ensure at a sufficient level for the purposes of international competitiveness. Biotechnology and renewable marine technology are two often cited examples of areas which should benefit from strong, prioritised support by public authorities (cf. the British example in marine power) ;
- On the other hand, it has a knock on effect on all industrial research in this area, as can be seen in the offshore sector.

At a national level, the new National Research Agency (ANR), in conjunction with the IFREMER, the CNRS and specialist public and private laboratories and in the context of the guidelines of the 7th framework research and development program (PCRD), needs to play a major role in the definition of priorities and coordination of programs. The project tender process, extended to introduce maritime-specific elements and open new programs dedicated to maritime sciences and techniques, seems well-suited for this type of encouragement. The recent establishment of new public-private partnership tools could be an interesting complement to this by means of convergent industrial measures.

At a regional level, the French **"Sea" competitive cluster** is the most natural framework for these initiatives. It already groups together almost 90% of national players in research, both public and private. For these reasons, this type of action must be able to benefit from the support of all professionals through the *French maritime cluster*.

Along these lines, the harmonious integration into current (2000) and renewed (2008?) Lisbon strategy objectives also provides political support relevant to a greater emphasis on maritime topics in major national and community-wide research programs.

3.2. Three major proposals for collaboration

► *Launching a major industrial and technological program based on exploiting ocean depths*

Important mobilising programs can contribute to fleshing out and structuring a true national maritime policy. The announcement and subsequent establishment of a call for tenders of at least national scope would have a **symbolic and unifying value** evident in economic sectors as well as the media and public opinion. This involves making the most of the undeniable skills of French scientists and industrialists, existing potential for innovation, know how and accumulated experience to allow France to hold or strengthen leading positions on a global level in a limited number of areas where France already has a significant presence. The main idea is to channel this potential by grouping resources, organising synergies, structuring industrial assets and concentrating public efforts to avoid budgets being spread too thin. Joint mobilisation – alongside the state, its agencies and the regions in question – of major industrial groupings and small and medium enterprises is vital to ensuring success: the will prioritise cooperation with competitive clusters in the maritime sector must in this respect be clearly stated.

- The group considers that the question of **exploration and exploitation of ocean depths** in its broadest sense (knowledge and responsible exploitation of resources under and on the seabed, water columns) constitutes the most promising prospect. The structuring and mobilising force of this **global option** is based on the following elements:
 - France's extensive *experience* in this area domain;
 - *High technological and scientific levels*, in particular compared with those of the United States;
 - The need for a *lasting commitment by the state*, bearing in mind the long term economic effects expected;
 - Numerous sectors will *benefit* from it: the scientific world (better knowledge of habitats, oceanology, biodiversity, equipment), gas and offshore oil industries/biotechnologies/health (new molecules), innovative naval construction (specialist vessels, submarine research), defence and armaments, new energies;
 - A major opportunity for exploiting the extraordinary wealth in waters under the jurisdiction of *overseas territories* and consistent with the EXTRAPLAC measure (extension of continental platforms, estimated at a million square kilometres of extra sovereign rights) ;
 - An approach that is *consistent with the European Green Book*, which views the development of research as an essential element for economic prosperity and environmental protection;
 - *The assured participation of actors in the maritime economy* (scientists and researches, offshore industries, overseas territories, fishermen, ecologists, French industrialists, the military, ship-owners, seismic vessel owners, and so on) in a framework which goes to the heart of their specialisation;
 - Resonance with a *potentially very favourable collective subconscious* (the Cousteau sagas, COMEX poems, films like *The Big Blue*, adventures about the conquest of the moon, the positive image of the relation between health and the sea, and etc.).

The initiative might draw upon the structures of the **Industrial Innovation Agency (AI)** and mobilise the **“Maritime” cluster in the service of global aspirations**, grouping two competitive clusters in Brittany and Provence-Alpes-Côte d’azur.

- As a complement to this priority program, numerous other projects, more specific in their scope, have been identified and put forward. The following list is of course non-exhaustive:
 - The exploitation of *marine energy* beyond offshore wind farms (tidal currents, waves, deep/underwater currents, thermal energy of the seas, non conventional hydrocarbons etc.) might involve, in particular: EDF, Total, Alstom, Aker Yards, etc. This is a very long term project deemed highly promising by some, unrealistic by others. It should be stated that Great Britain is a leader in this area thanks to strong investment in R & D (example: a project to develop a floating wind farm producing liquid hydrogen).
 - The development of *innovative vessels* integrating future limitations (design, propulsion and architecture of the vessel; high speed boats; design of a replacement for the double hull; processing waste and its impact; innovative maintenance; end of life, recycling and dismantling etc.) could be of interest to DCN, Aker Yards / Chantiers de l'Atlantique, nautical industries etc. (examples: a design for a fishing vessel using fifty percent less power, or a more functional layout by greater use of miniature devices, floating islands, underwater cruisers, etc.).

- The design of *port projects* to deal with increased traffic (hub ports, floating hubs to feed containers, LNG import terminal, floating port for pleasure craft, etc.).
- 3 dimensional mapping of marine areas under French jurisdiction: this project could be based on all information acquired while exploring under the seabed as well as work carried out for several years now by the IFREMER, the BRGM, the IFP and other university bodies as well as the SHOM. It would contribute to the establishment of an inventory of mineral and fossil resources on and under the seabed, the absence of which has greatly hindered the prospects for exploitation of marine resources. Such an inventory might aid in the collection and structuring of useful data for many other domains (navigation, fishing, heritage etc.).
- The inventory and exploitation of maritime *biological resources* will in particular benefit the pharmaceutical, agri-food and cosmetics sectors. This inventory is of interest in that it will necessarily examine relations between biotechnologies and knowledge of how ecosystems work. There is room for significant possible synergies here and such a project could possibly count on the support of Sanofi, Rhodia, the INRA, the IFREMER and university laboratories, complementing an industrial policy of innovation adapted to suit SMEs.
- The development and production of *equipment* for work in deep waters and *execution of specialist submarine work*. This area, in which France already has significant experience, could benefit not only the domains of offshore exploration and exploitation (mining and energy resources, etc.) but also handling the most critical recent or dormant shipwrecks (refloating, pumping, breaking up etc.). The project might involve bodies such as main players in the offshore and naval construction sector, DCN, the CEDRE, the IFREMER, specialist ship owners such as the Bourbon Group, and perhaps even the European Marine Safety Agency (EMSA) itself.

Among these projects, the group has particularly favoured those, mainly industrial, relating to the **development of innovative technology for future vessels** (clean and efficient propulsion, advanced hydrodynamics, end of life and dismantling, reduction and processing of onboard waste, preventative and easier maintenance, remote diagnosis etc.). This latter proposal is as of much interest to merchant shippers and cruise ships as to fishing vessels. It has a dual advantage: on the one hand, it contributes without problem to the realisation of the federative programme proposed above; on the other, it encourages a community-level approach by drawing upon scientific networks and possibilities for industrial partnership beyond national frontiers. For this reason, this project might be advantageously proposed to the European Commission (see third proposal below, “Anchoring the maritime future firmly within Europe”).

The structures of the National Research Agency (NRA) and the industrial Innovation Agency (IIA) need to identify and finance projects. The **competitive clusters** which have been able to emerge and combine in the maritime sector are currently ready to take on more ambitious and coordinated projects in a more extended form. Finally, the commencement of such strategic projects needs to receive the support of a financial engineering measure to be established based on the defence sector’s public-private partnership model (Financière de Brieenne).

► *Improving measures for managing maritime affairs*

In maritime matters, the French government has uncontested sovereign power: a necessary condition for achieving the ambitious objectives described above is therefore an organisation ensuring **sufficient coordination** of the action of the different ministries involved at the same time as maritime ambitions are made a **political reality**.

Reporting to the Prime Minister, the General Secretary to the sea — supported by maritime prefectures and representatives from overseas territories — has for ten years now been key to an organisation ensuring these tasks can be carried out. Based on the experience acquired so far, certain developments may be envisaged.

- Reinforcing the government's capacity for arbitration, decision-making and management

French maritime policy calls into question serious **sovereign challenges** bearing on many fields of intervention. Its implementation requires intense **inter-ministerial** work and this presumes the existence of recognised expertise, research resources and better prepared decisions, real arbitration capacity and, if possible, a visible financial level capable of supplementing – on the basis of very “horizontal” innovative operations or programmes – the normal financing of the ministries in question, generally more targeted towards sectoral actions.

Some countries, such as Portugal, have or have had a Maritime Minister or a Secretary of State to Maritime Affairs directly reporting to the head of the government. In France, the transport minister is also the minister responsible for maritime matters. Political visibility and the importance given to the sea at a very high level are increased but coordination difficulties have not totally disappeared for all that. It has been suggested that France could update its thinking on this type of governmental system without at this stage prejudging future political developments.

The existing political system could also be strengthened through the provision of a **national fund for the sea** (equivalent to national and regional development funds — FNADT).

These funds could first be set at around 50 million euros, initially for the purpose of financing programmes or operations concerning the maritime aspects of future State-region project contracts: scientific programmes, regional industrial innovation, submarine technologies, marine energy resources, biotechnology, experimental fish and shellfish breeding programs, coastal engineering, etc.

Most decisions in maritime areas will continue to be made by numerous ministries. The Inter-Ministerial Maritime Commission (CIMER) should therefore be reactivated to better display governmental interest in maritime matters in the framework of an annual meeting. In fact, only a single high level public authority is likely to define and lead an integrated maritime policy based on a shared and prospective vision and carry out actions vital to its promotion and its international and European visibility. This coordination task would benefit by drawing upon **better visibility of budgetary efforts** in maritime matters, which would make it possible to monitor and assess public policies implemented in this area. Rather than using the definition of a “maritime” mission and “maritime” LOLF programs in all ministries involved – an extraordinarily complex exercise – the presentation to parliament of an annual summary tracing the credits devoted to maritime policy together with the results achieved would enable greater visibility by means of more realistic methods.

- Establishment of a sustainable framework for reflection and cooperation among maritime actors (National Council of Oceans)

The need for better integration of the economic, ecological, social and territorial interests specific to the maritime sector argues for the definition of a relevant framework for national maritime policy. The absence of a space for reflection, expertise, cooperation, confrontation and the settlement of tensions and proposals is now making itself genuinely felt. There are of course examples of public coordination (the Economic and Social Council, the High Council of the Merchant Marine, the High Council of Pleasure Boating and Nautical Sports, the National Coastline Council created on 18 November 2005 and established on 13 July 2006), public utility (the French Maritime Institute- IFM) and private bodies (the French Maritime Cluster). However, none of these examples, which are either too focussed or too general, have the possibility or legitimacy for today playing the role of integrator and consultant in a field as vast as that of the ocean.

The establishment of a true “consultative assembly for the sea”, gathering together socioprofessionals, government bodies and regional groupings, in this respect represents a decisive step forward.

This proposal echoes similar initiatives planned or implemented in other countries: Australia, Canada, Portugal, the United States etc. Thus, the **National Ocean Council** (NOC), a consultative and strategic body placed alongside the NOAA (National Oceanic and Atmospheric Administration), was recently established and is presided over by a cabinet member close to the US President. It is interesting to note that the NOC's area of competence includes, in addition to local or remote marine areas under the jurisdiction of the United States, coastal areas, estuaries and the Great Lakes. Finally, the National Ocean Council is assisted by two committees: one for the management of ocean resources and one on science, education, technology and operations.

- Placing political powers in coastal regions into context

The group is unanimous in highlighting the increasingly important role of **local groupings**, and in particular **regions**, in establishing guidelines for territories, infrastructure and spaces. Just recently (the law on liberties and local responsibilities of 13 August 2004), decentralisation gave responsibility for almost all non-independent ports to local groupings. First and foremost, this involves explicitly involving these latter in measures for drawing up maritime policies. In particular, this will favour **cooperation** between different administrative levels of decision-making and action and associative and social and economic players by further adhering to the principles of **Integrated Management of Coastal Areas** (GIZC).

Today, it is no longer possible to consider problems concerning the allocation of economic spaces and activities, conflicts of use in coastal or border areas (habitat, aquatic cultures, coastal industry, recreation, tourism etc.) or the relationship with inland life (economic hinterland, transport, impact of water and air pollution from the interior etc.) as properly analysed and treated without explicitly involving regional and local levels. The state's responsibility is:

- On the one hand, to establish what are often very costly **analysis and information tools** in the service of decision-makers (the sharing scientific resources at a national level);
- On the other hand, to create **tools for the coordination and synergy of infrastructures** – strangely absent in the case of ports, for example (maritime, rail, river, port, logistic activities etc.);
- Finally, to set **serious and precise rules** that it can apply to itself (coastal law, reform of the fishing fleet etc..).

The balanced development of the coastal economy will only take place through a **contractual or controlled decentralisation of responsibilities**. This is particularly the case of coastal tourism which, it is to be recalled, counts for half of the maritime economy and which, together with residential issues, represents a growing source of conflict with competing activities and concerns.

Competition between commercial, recreational and fishing ports under the aegis of different authorities and the resulting public budget waste recently revealed by the Public Audit Office must lead to **an inevitable evolution towards the strengthening of regional power and the standardisation of maritime policy** – in the framework of the upcoming decentralisation law, for example – whenever **local questions** are at stake and subject to the necessary **national regulations**.

Even if not completely convincing, the example of some of our European partners, among whom regional authorities play a greater role than in France, might serve as models for courageous and innovative measures in France. The negotiation of the fifth generation of contracts between the state and the regions ("**State-Regions Project Contracts**") for a seven year period (2007-2013) may lay the ground for original action (cf. regional initiatives regarding regional railway networks — TER) and even significant opportunities. In this connection, it is to be recalled that two of the three favoured axes chosen by certain regional executives and presented by the government as a framework for this CPER approach are, on the one hand, territorial competitiveness and attractiveness and, on the other, the promotion of sustainable development (cf. European Union objectives defined in Lisbon and Gothenburg).

► *Anchoring our maritime future firmly in Europe*

In the context of the European construction and the recent publication of the Green Book, it is important for **the future national maritime policy** to take full account of the European dimension beyond already harmonised sectoral policies. This would serve as a very concrete confirmation of France's continuing support and active participation in the work of the European Commission on the Green Book (joint contribution of France-Portugal-Spain in 2005). Despite some remaining doubts, it is recommended to:

Reaffirm at all times France's ambition to develop a genuine European maritime policy covering the three pillars of community action and addressing the maritime challenges facing Europe – continental and ultra-marine – in the hope that the European union will become, in supporting the Member States which comprise it, a genuine actor in international maritime bodies (IMO, WTC, UN, etc.).

Europe's involvement must be a source of strategic values rather than of diplomatic or economic conflict. First and foremost, the European Union must intervene in fields where member states are not individually strong enough: control of maritime traffic and security, monitoring habitats, protection of major ecosystems, defence etc. In this connection, it is worth highlighting the essential contribution of the **French navy** to the defence of the European Union thanks to the important contribution of its specific capacities (nuclear submarine missile launchers, offensive nuclear submarines, aircraft carriers, cruise missiles). This represents one of France's major contributions to European defence policy.

An explanatory and indeed pedagogical effort must accompany this approach in order that the benefits of dealing with certain problems at a European rather than a national level are clear and understood by all. What's more, numerous sectors are already totally dependent on European competence (environment, fishing etc.). Without seeking to be exhaustive, several prospects for extending European involvement can be cited:

- The priority recommendation is the promotion of a **major structural project on a European scale on innovative technologies for vessels of the future**. The main lines of this project have already been indicated above. Such an initiative, which would respond to the desire recently expressed by Joe Borg, European Commissioner for Fishing and Maritime Affairs, would be best pursued as part of other processes undertaken at a community level in the area of research and development (7th PCRD, European Institute of Technology Project - EIT) at the same time as strategic alliances and innovative industrial partnerships are actively encouraged.

This recommendation does not of course preclude the opportunity for proposing a community approach to other projects in one of the areas referred to above (exploitation and use of the ocean depths, sea power, etc.).

- The consolidation at the European level of an **ambitious program of operational oceanography and ocean monitoring** which is already well under way and should be pursued in the context of "Global Monitoring for Environment and Security" (GMES).
- The reaffirmation of support for measures encouraging **shared resources** undertaken at a community level, in particular via the positioning of the EMSA in relation to preventative resources (dedicated anti-pollution vessels) and anti-pollution measures or via the promotion of a network to monitor the Union's maritime approaches (the debate on the opportunity to create a European coast guard corps has already been launched several times at a community level and is mentioned in the Green Book on Union maritime policy).

- Active support for the development of an **environmental policy adapted to maritime issues** at the community level, taking account of the unique situation of France given its large EEZ, in particular in overseas territories.
- The search for an explicit linkage between maritime initiatives and community policies on environment and energy savings via a proposed **European infrastructures development plan** based upon a network of European ports which will seek combined specialisation rather than unbridled competition (with integration of internal road, railway, gas and electricity networks etc.).
- Beyond the agricultural domain, the proposal to use this European maritime initiative as an essential vector for **development aid** to underdeveloped coastal countries.
- The search for concerted community action in the area of **dismantling large vessels** – commercial, recreational and military (inter ministerial project under way).

3.3. A vital support measure: improving training in maritime professions

A special effort must be made to encourage training in maritime professions and make them more attractive as careers. France has effective tools in these areas but they are often dispersed and significant gaps remain (maritime law, international maritime law etc.). Federating merchant navy officer schools into a large maritime professions school (a sort of civil *Naval Academy*) or creating a network (on the initiative of the European Institute of Technology – EIT) of organisations engaged in training for both operational maritime professions and research activities would enable economies of scale and help break down the barriers between the various sectors of the maritime economy.

While the creation of a **maritime university** of European and even global standing would make the most of national know-how in maritime matters and contribute to our international influence, it cannot not be exclusive. Without under-estimating the interest in further examining this prospect, it is above all worth promoting a *network dynamic* based on existing research networks at a European and Global level. Here, too, France is well-placed. One possible approach might consist in drawing upon the system recently established by the “Advanced Research Thematic Network” (creation of a “maritime ARTN”?) by examining the possibility for extending from a national to a European level.

It would also be a good idea to strengthen the **possibilities of advancement** in the course of professional maritime careers by giving greater weight to acquired experience and increased ongoing training measures. This could be done by public initiatives or in the context of professional organisations.

4. A strong political signal for the future

France aspires to be a great maritime nation. It has the means to become one. It has numerous assets for strengthening its position. The **political aspect**, which would involve a clear commitment on the part of the state to devoting the political and financial resources necessary to bringing actions to fruition, is impatiently awaited impatiently by the main actors of the maritime economy. This encouragement, strengthened and given greater credibility through the concurrent reinforcement of safety and security rules, would represent a new departure for a national maritime economy that is respectful of the environment and creates wealth and jobs.

Support for a policy is only achieved through **appropriate and lasting communication**. It must be as broad as possible and draw upon the best use of our maritime assets and the strengths of actors in our maritime economy (constructors, merchant shipping etc.) as well as those of our cultural and sporting life (solo sailors or winners of major transatlantic races, writers). The launching of unifying projects can contribute to this by providing **symbols** which the state as well as all actors will be inclined to endorse.



<p>Centre d'analyse stratégique www.strategie.gouv.fr</p>	<p>Useful web sites</p>	<p>Secrétariat général de la mer www.sgmer.gouv.fr</p>
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Appendices

Appendix 1: Mission statement

Le Premier Ministre

Paris, le - 3 OCT. 2005

N° 1894

4-X-05 221

Monsieur le Commissaire général,
Monsieur le Secrétaire général,

Par courrier en date du 26 juillet dernier, vous m'avez proposé de mettre en place un groupe de prospective sur la politique maritime française. J'appuie naturellement cette initiative particulièrement opportune au moment où la Commission européenne engage la réflexion en vue d'un « Livre vert » sur la politique maritime de l'Union. Cette initiative permettra d'y contribuer activement et d'affirmer le rôle majeur que la France entend jouer dans ce domaine.

J'attends également que votre réflexion m'apporte, d'ici un an, les éléments constitutifs d'une véritable politique maritime nationale, reflet de notre ambition en la matière, qui assure la cohérence et l'efficacité de l'action des multiples acteurs concernés.

Vous voudrez donc bien conduire vos travaux en y associant étroitement les partenaires majeurs du monde maritime, publics et privés. Vous me rendrez compte régulièrement de l'état de vos réflexions.

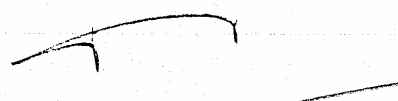
Je souhaite rendre publique cette initiative à l'occasion du comité interministériel de la mer qui se tiendra en novembre prochain.

Je vous prie de bien vouloir agréer, Monsieur le Commissaire général, Monsieur le Secrétaire général, l'expression des mes sentiments les meilleurs.

P/ Dominique de VILLEPIN

Pierre MONGIN

Monsieur Alain ETCHEGOYEN
Commissaire général au Plan
Monsieur Xavier de la GORCE
Secrétaire général de la mer



Appendix 2: Composition of the “POSÉIDON” working group “French maritime policy”

M. Gérard d'ABOVILLE, président du Conseil supérieur de la navigation de plaisance et des sports nautiques

M. Bernard ANNE, directeur, division marine, Bureau Véritas

M. Francis BAUDU, administrateur de Barry Rogliano et Salles

Mme Catherine BERSANI, inspecteur général de l'équipement, Conseil général des ponts et chaussées /ministère des transports, de l'équipement, du tourisme et de la mer, rapporteur de la Commission « littoral » du Conseil national d'aménagement et de développement du territoire

M. Pascal BERTEAUD, directeur de l'eau, ministère de l'écologie et du développement durable

M. Anne-François de BOURDONCLE de SAINT SALVY, contre-amiral, sous-chef d'État-major plans, État-major de la marine

M. Dominique BRESSON, chargé de mission, Délégation interministérielle à l'aménagement et à la compétitivité des territoires, DIACT (ex - DATAR)

M. Christian BUCHET, professeur d'histoire maritime, vice-doyen de l'Institut catholique de Paris et président du Centre d'études de la mer, co-organisateur avec l'Institut français de la mer (IFM) des « mardis de la mer »

M. Damien CAZÉ, directeur des pêches maritimes et de l'aquaculture, ministère de l'agriculture et de la pêche

M. Vianney de CHALUS, directeur général délégué, Groupama Transport (assurance maritime)

M. Marc CHEVALLIER, président, La navale française (transport maritime), Montpellier

M. Philippe FERLIN, ingénieur général du GREF (responsable de la prospective au CGGREF)

M. Gérard FRIES, directeur du Centre de résultats exploration-production, Institut français du pétrole (IFP)

M. Michel GIRIN, directeur du CEDRE (Centre de documentation, de recherche et d'expérimentations sur les pollutions accidentelles des eaux), Brest

M. François GROSRIECHARD, journaliste

M. Elie JARMACHE, Secrétariat général de la Mer

M. Richard LAVERGNE, secrétaire général, Observatoire de l'énergie et des matières premières, direction générale de l'énergie et des matières premières (DGEMP), ministère de l'économie, des finances et de l'industrie

M. Jean-Yves LE DRIAN, ancien secrétaire d'État à la mer, député du Morbihan, président du Conseil régional de Bretagne, vice-président de la Conférence des régions périphériques maritimes d'Europe (CRPM), Rennes

M. Christian MANTEI, directeur, ODIT-France (Observation, développement et ingénierie touristique France)

Mme Annick de MARFFY-MANTUANO, vice-présidente de l'INDEMER (Institut du droit économique de la mer), Monaco, professeur émérite de l'université Paris 1, ancienne directrice de la division des affaires maritimes et du droit de la mer, ONU, New York

M. Jean-François MINSTER, directeur scientifique de TOTAL, ancien directeur scientifique général du CNRS, ancien président-directeur général de l'IFREMER

M. Hervé MOULINIER, directeur délégué de THALES Systèmes aéroportés, Brest, co-président du comité de pilotage du Pôle de compétitivité Mer Bretagne « Sea-nergie »

M. Jean-Paul PERON, chef de la division « Ferroviaire-navale », direction générale des entreprises / DGE, ministère de l'économie, des finances et de l'industrie

M. Jean-Yves PERROT, président-directeur général de l'IFREMER

M. Bernard PLANCHAIS, directeur, DCN Service (direction des constructions navales), Toulon, représentant la partie PACA du Pôle de compétitivité « Mer, sécurité, sûreté, développement durable »

M. Patrice RAULIN, directeur général de la mer et des transports (DGMT), ministère des transports, de l'équipement, du tourisme et de la mer

M. Henri de RICHEMONT, sénateur de la Charente, président du groupe d'étude de la mer au Sénat

Mme Danielle SCHIRMANN-DUCLOS, haut fonctionnaire « développement durable », mission scientifique, technique et pédagogique (MSTP), ministère délégué à l'enseignement supérieur et à la recherche, représentant le délégué interministériel au développement durable (DIDD)

M. Fabrice THEOBALD, délégué général de la Chambre syndicale des constructeurs de navires (CSCN)

M. Sébastien TREYER, chargé de mission prospective, direction des études économiques et de l'évaluation environnementale (D4E), ministère de l'écologie et du développement durable.

Rapporteurs: *Jean-Luc PUJOL* (Centre d'analyse stratégique)
Gilbert Le LANN (Secrétariat général de la mer)
Eric BANEL (ministère des transports, de l'équipement, du tourisme et de la mer / Affaires maritimes)

Coordinator: *Philippe HIRTZMAN* (Centre d'analyse stratégique)

